

### DAY ONE

- I. **Install Numara® Track-It!®**
  - A. Installation Prerequisites
  - B. Installation Models
  - C. Install Numara Track-It!
- II. **Advanced Interface Tools**
  - A. Configure the Button Bar
  - B. Customize the Toolbar to Search for a Record Variable
  - C. Configure the Global Help Desk Toolbar
  - D. Configure Grid Options
  - E. Use the Field Options Dialog
- III. **Administering Technician Access to Numara Track-It!**
  - A. Understand Security Policies
  - B. Modify the Default Security Policy
  - C. Create Security Policies
  - D. Assign Technicians to a Security Policy
  - E. Create Technician Queues
- IV. **Data Setup and Database Concepts**
  - A. Understand the Numara Track-It! lookup tables
  - B. Categorize Work Orders
  - C. Define Work Order Priorities
  - D. Remaining Lookup Table Discussion
  - E. Discuss the other Significant Numara Track-It! Tables
  - F. Backup Numara Track-It! Data
- V. **Numara Track-It! 9 Configuration Essentials**
  - A. Understand the Numara Track-It! Administration Console
  - B. Configure Administration Options
  - C. Check for Updates
  - D. Configure Help Desk Options

### DAY TWO

- VI. **Configure Numara Track-It! Discovery and Audit**
  - A. Manage IT Assets
  - B. Discuss Asset Discovery Options
  - C. Configure Asset Discovery
  - D. Schedule Asset Discovery
  - E. Manage Your Discovered Assets
  - F. Understand Audit and Audit Components
  - G. Use the Administration Console to Configure Audit Options
  - H. Configure Audit Execution
  - I. Schedule Automatic Auditing
  - J. Specify Scan Criteria
  - K. File Capture Information
  - L. Set up Credentials for Windows Installation
  - M. Merge Audit Results
  - N. Perform a Distributed Audit
  - O. Change the Audited Software Approval Status
- VII. **Manage the Inventory Module**
  - A. View Asset Information
  - B. Save Hardware Tab Views
  - C. Maintain Asset Users
  - D. Add Inventory Information Manually
  - E. Audit-on-Demand, Delete, and Copy an Asset
- VIII. **Set up Software License Management**
  - A. Software License Management Overview
  - B. Software License Management Process Flow
  - C. Set up the Software Module Lookup Tables
  - D. Define Software License Management Options
  - E. Create software Titles and Licenses
  - F. Associating Software Titles with a Master Item
  - G. Notifying Technicians When License Conditions Change
- IX. **Develop Work Order Assignment Procedures**
  - A. Understand Workflow Models
  - B. Create Work Order Assignments
  - C. View Work Order Assignments

### DAY THREE

- X. **Manage the Workflow Automation Toolset**
  - A. Understand Event Policies
  - B. Determine E-mail Notification Options for Event Policies
  - C. Create an Event Policy
  - D. Understand and Create Service Level Agreements
  - E. Understand and Create Skill Routing Policies
  - F. Understand and Create Work Order Templates
- XI. **Utilize the Solutions Module**
  - A. Use the Solutions Database
  - B. Access, Add, Edit and Delete Solutions
  - C. Reorganize Topics and Solutions
  - D. Access Solutions via a Work Order
  - E. Add a Solution to a Work Order
  - F. Create a Solution via a Work Order Resolution
- XII. **Configure Numara Track-It! E-mail Automation**
  - A. Configure Numara Track-It! E-mail Monitor
  - B. Configure Numara Track-It! Work Order Notification Templates
  - C. Configure Manual Work Order Notification
- XIII. **Set up the Change Management Process**
  - A. Change Management Overview
  - B. Define the Different Types of Change
  - C. Classify Change Requests
  - D. Discuss Change Management Roles
  - E. Set Up Change Management Policies
  - F. Configure Notifications for Change Management Events
  - G. Customize Notification Templates for Change Management Events
  - H. Schedule Notifications for Change Management Events
  - I. Manage Requests for Change
  - J. Manually Create a Request for Change
- XIV. **Information Analysis**
  - A. Navigate the Crystal Reports Viewer
  - B. Exporting Selection Criteria to a Report
  - C. Work with the Numara Track-It! Dashboard
- XV. **Review for and Take the Certified Numara Track-It! Administrator Exam**